WELFORD CHART NOTES
NEWSLETTER

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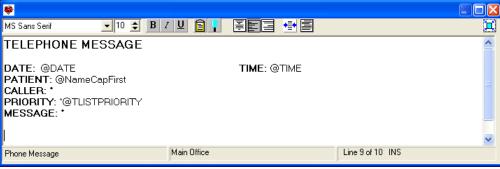
USING THE WRITER AS A FORM *(User's Manual, pgs. 923-927)*

From the very first version of **Welford Chart Notes**, the Writer has looked and operated like a word processor. Starting with version 4.9, you have the option of having it work like a form to be filled out. Using it as a form is especially appealing for novice users, and for users who use it for certain basic, repetitive tasks. For example, a secretary who uses it to record phone messages or an intake nurse who uses it to record certain basic information on each patient may find it simpler to fill out a form than to use a word processor. Let's give this a try.

1. To make the Writer present itself as a form, select System\Writer Options and choose **Form View**. (To go back to using it as a word processor, choose **Word Processor View** instead). Make sure **Template Auto-Ask** is also checked.
2. When using Form View, the program loads a single Template into the Writer to use as the basis of the form. Therefore, you need to create at least one Template. (If the user has more than one Template available, then the user simply chooses a Template from the list to use for that particular note.) Let's create a Template now:
3. Press Libraries\Templates**ADD.**
4. For **Template Name**, enter "Phone Message".
5. For **Type of Note**, choose **Any Note.**
6. Leave the other choices at their defaults and press **OK.**
7. Enter the Template text as shown below:
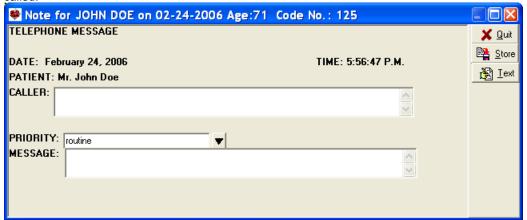

8. Note that this Template uses a Wordlist named Priority. Let's create this Wordlist:
9. Press <Alt-T>emplate \Wordlist\Edit**ADD.**
10. For **Input Template Wordlist Title**, enter PRIORITY and press **OK.**
11. Press **ADD.**
12. For **Template Wordlist Item**, enter "emergency" and then press **OK.**
13. Repeat steps 11-12 to add "urgent", "routine", and "any time" to the Wordlist.
14. Highlight the word "routine" to make it the default setting.
15. Press **OK** to store the Wordlist.
16. Press <F10> to store the Template.
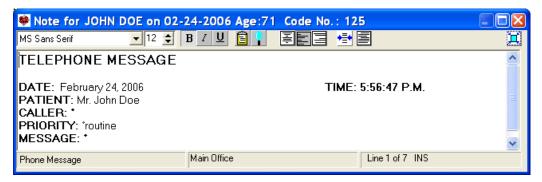
Now, let's use this Template in Form View.

1. Press Write\New Note\Note and enter a patient name.
2. Select the Phone Message Template.
3. Note that the @Functions are automatically filled in on the screen.
4. The program defaults to the first open spot on the form (**Caller**). Type in information about who called.

5. Choose a **Priority** from the Wordlist. (You can use the default of **routine** or press the down arrow button ▼ to choose another choice. You can also type in any text you like instead)
6. Type in the text of the **Message**.
7. Press **STORE** to store your note.

Note that if you wanted to switch to using the Word Processor View for this document, you could have pressed **TEXT** instead. You could then edit the note further in any way you wish, instead of sticking to the relatively rigid format of the form. Here is how that would look:

Also note that the program parses your note, regardless of whether you write it using Form View or Word Processor View, in exactly the same fashion.

Finally, note that if you put Wordlists into Form View, if the Wordlist you are using calls one or more other Wordlists, it is automatically expanded out to form a single, larger Wordlist, rather than causing additional Wordlists to open up (the way Word Processor View does). Therefore, you should avoid very complex Wordlists when designing Templates to be used in Form View.

NEWS ON UPCOMING VERSIONS
We are continuing work on version 5.0. It lets you convert Quality Measures to Rule Reminders. Please let us know if there are new features you would like to see included.

SEND US YOUR TIPS
If you have tips, shortcuts, questions, or suggestions for future newsletter topics, please send them to us at:

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